



Outbound Patients and Appointments

Common Use Case Package

athenahealth, Inc.

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Formerly EMR Lite and EMR Full

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* 1. Scoping Process

Your interface project manager is available to meet, assist with questions, and help determine the best-fit options for your project. Instructions for manual scoping are as follows:

1. **Review**:

Please read the Common Use Case Package and complete all form fields and check-boxes to the best of your ability. Should you have questions about the configuration options presented in this document please do not hesitate to discuss with your interface project manager.

If there is a customization request during the implementation process clients are subject to a fee. If there is a request to customize post go-live you will be subject to modification fees.

1. **Approve**:

When this document is completed to your satisfaction, please approve the scope of the interface by typing your name below.

* 1. Scope Approval

I,      , agree to the interface design as described here in this document.

Date:

1. Project Information

Please fill the following to the best of your ability. While not all contacts are required, you should be able to submit at least two contacts at the onset of a new interface project.

|  |  |  |  |
| --- | --- | --- | --- |
| General Information | |  |  |
| Integration Project Name (if applicable) | | |  |
| Vendor  (If applicable, third party data exchange vendor) | Company Name:  (ex. athenahealth, Inc.) | |  |
| Software Product Name:  (ex. athenaNet) | |  |
| Version:  (ex. 14.9) | |  |
| Interface Engine:  (ex. athenaNet MX Engine) | |  |
| Trading Partner Name | | |  |
| Trading Partner Type (ex. Health Information System, EHR, etc.) | | |  |
| athenahealth Practice Context ID | | |  |
| athenahealth Interface Project Manager Name | | |  |
| athenahealth Interface Project Manager Contact Information | | |  |
| Event Number (provided by Interface Project Manager, for internal athenahealth tracking) | | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Contact | Role | Details | |
| Project Business Contact | Responsible for overall success of the project | Name: |  |
| Phone: |  |
| Email: |  |
| Project Interface Contact | Interface expert, responsible for continuing interface support | Name: |  |
| Phone: |  |
| Email: |  |
| Project IT Contact | Networking and security expert, responsible for overall connectivity | Name: |  |
| Phone: |  |
| Email: |  |
| Vendor Contact #1 | Role: | Name: |  |
| Phone: |  |
| Email: |  |
| Vendor Contact #2 | Role: | Name: |  |
| Phone: |  |
| Email: |  |

1. Product Description

This interface supports the secure and automated transfer of information between an external third-party system and athenaNet. To ensure compatibility across a wide array of platforms and software vendors interface data is formatted according to HL7 v2 standards.

By choosing to move forward with this standard integration you are committing to the scope outlined below. If you require any customization to this integration, please contact your athenahealth project manager to engage athenahealth’s Integration Design team for detailed scoping. Please note that any customizations will result in this integration becoming a custom interface, and will incur additional fees.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Event | Default Message | Functionality |
|  | Add Patient | New Patient ADDED in athenaNet | A28 | Outbound |
|  | Update Patient | Patient UPDATED in athenaNet | A31 | Outbound |
|  | Schedule Appointment | Appt SCHEDULED in athenaNet | S12 | Outbound |
|  | Update Appointment | Appt UPDATE in athenaNet | S14 | Outbound |
|  | Cancel Appointment | Appt CANCELLED in athenaNet | S15 | Outbound |
|  | Check-In | Appt CHECKIN in athenaNet | S14 | Outbound |
|  | Check-Out | Appt CHECKOUT in athenaNet | S14 | Outbound |

1. General Interface Configuration
   1. Message Samples and Specs

For athenahealth samples and specifications, please see the [Developer Toolkit](http://www.athenahealth.com/developer-portal/developer-toolkit/by-standard).

(http://www.athenahealth.com/developer-portal/developer-toolkit/by-standard)

|  |  |  |  |
| --- | --- | --- | --- |
| **Patient (ADT) Sample Message** | | | |
| A28  Add Patient | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Build||201709251601||ADT^A28|1307569M432|P|2.3.1  EVN|A28|201709250400|||username  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|40 TEST AVENUE^^BRIGHTON^MA^02135^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  NK1|1|TEST^EMERGENCY|SPOUSE||(555)666-4444||C  PV1|||52^TEST DEPARTMENT^^TEST DEPARTMENT  GT1|1||TEST^SPEC||40 TEST AVENUE^^BRIGHTON^MA^02135^UNITED STATES|(555)444-6666^TEST@EMAIL.COM||19900101|||Self||||||||||||||||||||||||||||||||||EMERGENCY TEST|(555)666-4444||SPOUSE  IN1|1|40^Self-Pay (cash)|40^Self-Pay (cash)|Self-Pay (cash)|||||||||||PP|||||||1 | | |
| A31  Update Patient | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Build||201709251621||ADT^A31|1307640M432|P|2.3.1  EVN|A31|201709250421|||username  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  NK1|1|TEST^EMERGENCY|SPOUSE||(555)666-4444||C  PV1|||52^TEST DEPARTMENT^^TEST DEPARTMENT||||132P432^AARDVARK^AARON||||||||||132P432^AARDVARK^AARON  GT1|1||TEST^SPEC||TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES|(555)444-6666^TEST@EMAIL.COM||19900101|||Self||||||||||||||||||||||||||||||||||EMERGENCY TEST|(555)666-4444||SPOUSE  IN1|1|40^Self-Pay (cash)|40^Self-Pay (cash)|Self-Pay (cash)|||||||||||PP|||||||1 | | |
| **Appointment (SIU) Sample Message** | | | |
| S12  Schedule Appointment | | | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Builder||201709251630||SIU^S12|1307656M432|P|2.3.1  SCH|605331|605331||||New Patient 15|THIS IS A TEST APPOINTMENT|NP15^New Patient 15|15|minutes|^^^201709270900|||||username|||||||||BOOKED  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  PV1|||1^Main Burrow^1^Main Burrow||||63P432^PHIL VERSION 2^TEST^DR.||||||||||63P432^PHIL VERSION 2^TEST^DR.||605331|||||||||||||||||||||||||||||||605331  AIG|||DRPHIL2|||||201709270900|||15|minutes  AIL|||1^Main Burrow|||201709270900|||15|minutes |
| S14  Update Appointment | | | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Builder||201709251638||SIU^S14|1307671M432|P|2.3.1  SCH|605331|605331||||Flu Shot 15|THIS IS A TEST APPOINTMENT;THIS IS ANOTHER TEST APPOINTMENT|FLU15^Flu Shot 15|15|minutes|^^^201709270900|||||username|||||||||BOOKED  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  PV1|||1^Main Burrow^1^Main Burrow||||63P432^PHIL VERSION 2^TEST^DR.||||||||||63P432^PHIL VERSION 2^TEST^DR.||605331|||||||||||||||||||||||||||||||605331  AIG|||DRPHIL2|||||201709270900|||15|minutes  AIL|||1^Main Burrow|||201709270900|||15|minutes |
| S15  Cancel Appointment | | | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Builder||201709251647||SIU^S15|1307695M432|P|2.3.1  SCH|605331|605331||||1^PATIENT CANCELLED|THIS IS A TEST APPOINTMENT;THIS IS ANOTHER TEST APPOINTMENT;THIS A CANCELLATION NOTE|FLU15^Flu Shot 15|15|minutes|^^^201709270900|||||username|||||||||CANCELLED  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  PV1|||1^Main Burrow^1^Main Burrow||||63P432^PHIL VERSION 2^TEST^DR.||||||||||63P432^PHIL VERSION 2^TEST^DR.||605331|||||||||||||||||||||||||||||||605331  AIG|||DRPHIL2|||||201709270900|||15|minutes  AIL|||1^Main Burrow|||201709270900|||15|minutes |
| S14  Check In | | | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Builder||201709251702||SIU^S14|1307765M432|P|2.3.1  SCH|629474|629474||||Flu Shot 15||FLU15^Flu Shot 15|15|minutes|^^^201709251715|||||username|||||||||ARRIVED  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  PV1|||52^TEST DEPARTMENT^52^TEST DEPARTMENT||||132P432^AARDVARK^AARON||||||||||132P432^AARDVARK^AARON||629474|||||||||||||||||||||||||||||||629474  AIG|||AARDVARK\_A|||||201709251715|||15|minutes  AIL|||52^TEST DEPARTMENT|||201709251715|||15|minutes |
| S14  Check Out | | | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Builder||201709251707||SIU^S14|1307967M432|P|2.3.1  SCH|629474|629474||||Flu Shot 15||FLU15^Flu Shot 15|15|minutes|^^^201709251715|||||username|||||||||COMPLETED  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666^^PREF~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  PV1|||52^TEST DEPARTMENT^52^TEST DEPARTMENT||||132P432^AARDVARK^AARON||||||||||132P432^AARDVARK^AARON||629474|||||||||||||||||||||||||||||||629474  AIG|||AARDVARK\_A|||||201709251715|||15|minutes  AIL|||52^TEST DEPARTMENT|||201709251715|||15|minutes |

* 1. Integration Testing Environment

A non-live, athena-hosted preview environment is provided to facilitate integration testing prior to moving the interface to production. It is expected that the other vendor system provides a similar non-live environment for testing on their side as well.

Will a vendor test environment be made available for this project?  Yes is recommended

If no, please tell us what will be done for testing:

* + 1. Testing Phases and Resource Allocation

Interface testing is generally broken up into two phases, unit testing and end-user testing.

In the unit testing phase, athenahealth works directly with the other vendor to ensure outbound messages are generated and delivered successfully to the receiver. For inbound message testing, athenahealth will confirm messages are received and processed.

Upon completion of unit testing, end-user testing phase begins. athenahealth may provide guidance when appropriate, but ultimately it is client responsibility to plan, organize, and carry out testing of their interface in relation to practice workflows.

1. Standard Functionality Overview
   1. Message Filtering and Control
      1. Selective Filtering of Outbound Messages

Should messages be filtered outbound (Y/N)?  No is recommended, where the interface will send all configured messages

|  |  |  |
| --- | --- | --- |
| Message Type | Filter Group | Filter By (Names) |
| Patients |  |  |
| Appointments |  |  |

* 1. Patients
     1. Patient Race, Ethnicity, and Language

For outbound patient messages, race and ethnicity will be sent in the following format.

|  |
| --- |
| Code Set |
| CDC Identifier (Ex. For a race of “White Mountain Apache”, we would send “1019-9”) |

For outbound patient messages, language will be sent in the following format.

|  |
| --- |
| Code Set |
| ISO6392 Code (Ex. For English, we would send “eng”) |

* 1. External ID Management

To assist with patient ID management throughout an integrated health system, athenaNet can store multiple external IDs. External IDs may be used for matching purposes or external IDs may just be interfaced and stored in athenaNet using custom fields. All patient IDs present in athenaNet, including external IDs such as those supplied by an interface or import process, are available to be sent out over the interface.

Please identify Person level Custom Fields here:

|  |  |  |
| --- | --- | --- |
| athena Custom Field Name | athena Custom Field ID | HL7 Field |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Please identify Appointment level Custom Fields here:

|  |  |  |
| --- | --- | --- |
| athena Custom Field Name | athena Custom Field ID | HL7 Field |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Are any of the above external IDs formatted with leading zeros?

Additional comments:

* 1. Provider ID Management

Wherever provider is included on outbound messages, it can either be sent as the provider’s NPI, or as the provider’s athena provider ID. Select your preferred option below.

|  |  |
| --- | --- |
| Option | Provider ID |
|  | Provider’s NPI |
|  | Provider’s athena Provider ID |

* 1. Appointments
     1. Appointment Status

For outbound appointment messages the interface sends a status in field SCH.25.  By default, the statuses coincide with the event that triggered the message.

|  |  |
| --- | --- |
| Trigger Event | SCH.25 Value |
| New Appointment | BOOKED |
| Appointment Check-In | ARRIVED |
| Appointment Check-Out | COMPLETED |
| Appointment Update | UPDATE |
| Cancel Appointment | CANCELLED |

**RECHEDULED APPOINTMENTS**: When a user reschedules an appointment through the athenaNet appointment workflow, it is actually cancelling the original appointment record and creating a new appointment record with a new athenaNet appointment ID. The interface will generate an appointment cancel message for the original appointment and an appointment create message for the new appointment. If this functionality will be an issue for your downstream system, please discuss this workflow with your athenahealth Project Manager.

1. Connectivity Method Overview

As part of interface implementation, athenahealth will need to establish a secure method of transfer for electronic data to and from a third-party system. The Connectivity Method Overview contains our current connectivity offering as well as information regarding functionality and project steps.

<http://www.athenahealth.com/~/media/athenaweb/files/developer-portal/Connectivity_Methods_Overview.docx>

For questions, please contact your Interface Project Engineer.

1. Appendices and Other References
   1. Planned Maintenance Window

The athenaNet MX Engine is subject to the same maintenance windows as the default, all interfaces are shut-off during this time window, and also remain disabled until 4 A.M. Eastern Time.

* 1. Interface Message Queue Manager

The athenaNet Interface Message Queue Manager (IMQM) is an interactive repository for all interface messages that pass through athenaNet. Messages can be categorized into several processing states. Please note that messages in a final state (processed or deleted) will only remain in the queue for 90 days.

|  |  |
| --- | --- |
| Message State | Explanation |
| SCHEDULED | Scheduled to be sent at a later time |
| NEW | Placeholder for a new message and ready to be sent or received |
| DISTRIBUTED | Delivery or acknowledgement is pending for Global interfaces |
| PENDING | Delivery or acknowledgement is pending |
| PROCESSED | Processed normally; remains in queue for only 90 days |
| ERROR | Generic error encountered; routed to client |
| CBOERROR | Billing related error encountered; routed to client |
| ATHENAERROR | Internal error encountered; routed to athenahealth Client Support Center |
| DELETED | Messages that have been deleted; remains in queue for only 90 days |

In order to access the IMQM in athenaNet to manually resolve common errors, such as missing providers, invalid procedure codes, or unknown departments, the following user permissions must be granted by the local system administrator:

|  |  |
| --- | --- |
| Permission | Use Case |
| Interface Admin: View Message Queue | You want to be able to view the IMQM. |
| Interface Admin: Map Insurance Messages | You need to map insurance messages. |
| Interface Admin: Map Messages (except Insurances) | You need to map all messages excluding insurance messages (e.g. provider and department mappings). |
| Interface Admin: File Upload Interface | You want to be able to upload files via the interface. |

See [athenaNet Interface Queue Management Guide](http://www.athenahealth.com/developer-portal/developer-toolkit/support) for more information on the functionality of the IMQM and on client-side cleanup for ERRORs and CBOERRORs.

* 1. Continuing Service and Support

Within two weeks after go-live your interface will be transitioned into our daily service and support structure.

As a standard practice, athenahealth continuously monitors all client connections and will notify the contacts specified if an error occurs. All jobs are monitored and automatically restarted if idle. For more details please refer to the [Interface Down Support Document](http://www.athenahealth.com/developer-portal/developer-toolkit/support).

To contact athenahealth for questions or modifications to the interface, support can be accessed directly in athenaNet:

